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Maryland
Department of Economic & Employment Development

LABOR MARKET DIMENSIONS

JULY, 1991

Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201

William Donald Schaefer, Governor
Mark L. Wasserman, Secretary

LABOR FORCE DEVELOPMENTS

While the strength of the recovery remains uncertain, it appears that jobseekers, particularly young people, are encouraged by signs of a turnaround in business conditions. During July, more than 70,000 jobseekers entered the labor market, pushing the civilian labor force up over the 2.6 million mark. Just over 50.0 percent of this increase was attributable to new and en-entrant jobseekers, a pool which characteristically includes a large segment of the student population. Employment moved ahead at a slightly higher rate, causing joblessness to decline by about 7,750 persons and lowering the jobless rate from 6.0 percent in June to 5.5 percent in July.

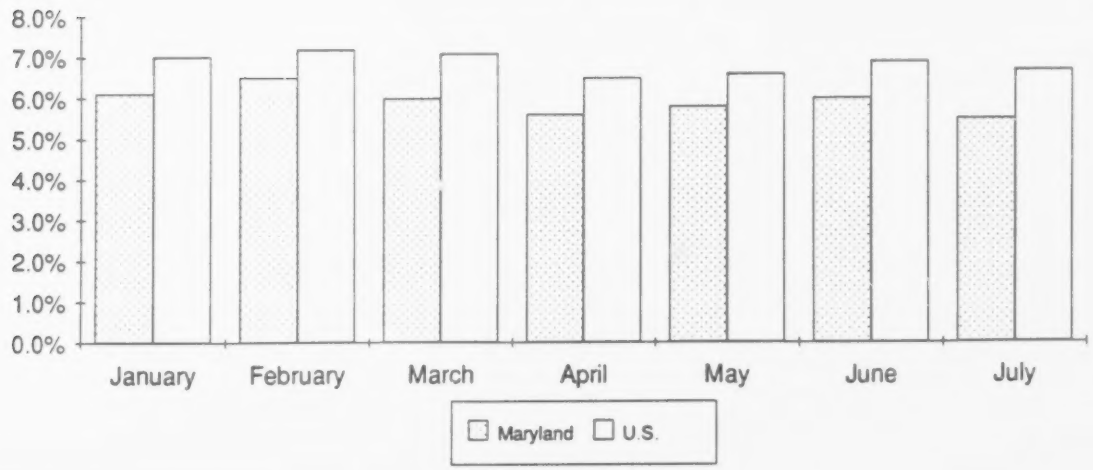
Nationally, unemployment while declining from 6.9 percent to 6.7 percent, exceeded the statewide average by more than a full percentage point in July.

	July 1991	June 1991	July 1990
Civilian Labor Force	2,627,635	2,555,200	2,606,473
Total Employment	2,483,349	2,403,158	2,476,424
Total Unemployment	144,286	152,042	130,049
Unemployment Rate	5.5	6.0	5.0
National Unemployment Rate	6.7	6.9	5.5

If the current recovery follows past trends, employment gains will be uneven and normal seasonal patterns may be altered as the economy continues a restructuring process. Movements in the unemployment rate will most likely be erratic before a period of consistent and uninterrupted employment growth can be achieved, thus stabilizing and, ultimately improving joblessness.

The large gain in employment reflected in the residential measurement was not supported by preliminary job counts reported by employers in Maryland's business establishments. A number of factors skewed comparability. The presence of strike activity in the manufacturing sector, the lag in reporting by a number of services and trade establishments (industries which employ a large number of youth), and suspected employment losses among multiple jobholders contributed to the incongruity.

UNEMPLOYMENT RATES MARYLAND AND U.S.
JANUARY-JULY 1991



INDUSTRY DEVELOPMENTS

The number of jobs provided by businesses in Maryland declined during July; however, the drop was slightly higher than the norm. Seasonal factors, coupled with relatively stagnant business conditions and reports of strike activity in the manufacturing sector, resulted in the loss of an estimated 23,400 jobs during July.

The impact of seasonal economics was most prevalent in state and local government where payrolls dropped sharply as educational facilities continued their semester break reductions. The drop in education was cushioned somewhat by hiring in other government jobs, particularly in local noneducation where seasonal hiring at recreational facilities and in other government-sponsored outdoor programs reduced the overall industry deficit by about 5,600 jobs.

Employment in the transportation sector also receded, with seasonal layoffs by private school bus carriers and reduced business activity in trucking and warehousing pulling down the job count. Meanwhile, in the services sector, normal July reductions in private education offset seasonal upswings in amusements and membership organizations. Losses, on a more limited scale, were reported in agricultural services. After reaching their summertime peak in June, employment in this industry dropped back by about 300 jobs in July. Demand was also down in business services during July, with losses centered primarily in computer and data processing firms.

In the population-serving trade sector, retail trade experienced a small, but unexpected, setback. While trends in apparel, furniture and building material/garden supply stores were relatively consistent with past years, the movements reported in general merchandise, food stores and eating establishments really swayed overall industry performance. In both general merchandise and eating places where growth is the norm during July, employment declines occurred. In food stores which last year rose by 500 jobs during July, a stagnant employment picture prevailed. In all, about 900 fewer jobs were reported by retailers in July.

The construction industry, still lacking the stamina necessary to ensure an imminent recovery, dropped by about 400 jobs. July's loss, while relatively small and not unusual for this time of year, reverses a trend which had been gradually uplifting the industry since February, 1991. Currently, employment in construction, at 156,500, is running about 7,000 below year ago figures. The general lack of vitality in general building construction has impeded the overall recovery process in this industry.

Following a gain of about 1,700 jobs in June, the manufacturing industry took a giant step backward in July, with employment declines totaling about 4,100. About 75.0 percent of this decline, however, was tied directly to strike activity in two separate industry lines. In transportation equipment, a strike-related decline of about 2,900 was reported and, in beverages, just over 300 jobs were affected by strike activity. Aside from declining employment in these industry groups, vacation shutdowns caused employment to temporarily subside in textile and apparel products.

While layoffs occurred in manufacturing, the status of production workers overall remained relatively unchanged. Work schedules were maintained at 40.7 hours per week in July, however, a drop of about $.16 in hourly pay rates lowered weekly checks by about $6.50 to $475.78. Changes were much more apparent at the detailed industry level. In transportation equipment, for instance, workweeks fell by about 1.5 hours to 37.8 in July. This decline, coupled with a reduction of $3.37 in hourly pay rates, caused weekly checks to drop sharply from $626.84 in June to $475.52 in July. In rubber products, workweeks were also reduced, by about 2.0 hours, however, the impact of this decline on earnings was less noticeable due to an increase in hourly pay rates from $9.95 to $10.10. In chemical products, on the other hand, increased overtime, coupled with hourly pay increases, raised weekly wages by more than $22.00 to $532.57 in July.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
JULY 1991

Industry	July 1991	June 1991	July 1990
TOTAL NONAGRICULTURAL EMPLOYMENT	2,158.8	2,182.2	2,193.6
Goods Producing	354.5	359.0	373.3
Mining	2.1	2.1	2.1
Construction	156.5	156.9	163.5
Heavy Construction	19.1	19.1	20.3
Manufacturing	195.9	200.0	207.7
Durable Goods	99.1	102.7	109.9
Lumber & Wood Products	4.0	4.1	4.3
Stone, Clay, & Glass Products	8.3	8.4	8.6
Concrete, Gypsum, Plaster	5.2	5.2	5.4
Other Stone, Clay, & Glass	3.1	3.2	3.2
Primary Metal Industries	10.0	10.0	11.1
Blast Furnaces	8.3	8.3	9.3
Fabricated Metal Products	9.8	9.8	9.9
Fabricated Structural Metal Products	4.1	4.1	4.2
Other Fabricated Metal Products	4.6	4.6	4.6
Industrial Machinery	15.4	15.7	16.5
Refrigeration & Service Mach.	2.1	2.2	2.3
Other Industrial Machinery & Equipment	9.3	9.3	9.7
Electronic Equipment	14.4	14.3	15.7
Communications Equipment	4.2	4.2	4.4
Electronic Component	3.5	3.5	4.0
Other Electronic Equipment	6.7	6.6	7.3
Transportation Equipment	9.9	12.8	14.1
Motor Vehicles	2.3	5.1	5.6
Other Transportation	3.2	3.2	3.6
Instruments & Related	22.0	22.0	24.2
Miscellaneous Manufacturing	2.6	2.7	2.6
Nondurable Goods	96.8	97.3	97.8
Food & Kindred Products	25.4	25.4	25.3
Meat Products	5.8	6.0	5.7
Beverages	4.3	4.4	4.5
Other Food & Kindred	10.3	9.9	10.2
Textile Mill, Apparel	9.7	9.9	10.0
Paper & Allied Products	9.7	9.7	9.6
Printing & Publishing	27.9	28.0	28.7
Chemicals and Allied Products	13.6	13.7	13.8
Rubber & Miscellaneous	8.4	8.5	8.3
Other Nondurable Goods	2.1	2.1	2.1

Industry	July 1991	June 1991	July 1990
Service Producing	1,804.3	1,823.2	1,820.3
Transportation & Public Utilities	101.3	101.6	102.6
Transportation	56.2	56.7	57.7
Railroad Transportation	4.4	4.4	4.7
Trucking & Warehousing	29.0	29.2	29.5
Communications & Utilities	45.1	44.9	44.9
Communications	28.4	28.2	28.6
Electric, Gas, Sanitary	16.7	16.7	16.3
Trade	534.0	534.9	543.5
Wholesale Trade	108.3	108.3	110.2
Retail Trade	425.7	426.6	433.3
Building Materials, Garden Supplies	17.8	18.4	18.2
General Merchandise	43.8	43.9	45.4
Food Stores	66.3	66.3	67.2
Eating & Drinking Places	142.5	142.8	143.5
Finance, Insurance, & Real Estate	131.7	131.8	133.9
Finance	57.5	57.5	59.5
Depository Institutions	42.6	42.5	43.7
Commercial Banks	27.4	27.5	28.2
Insurance	39.1	39.2	38.9
Insurance Carriers	25.9	26.0	25.6
Real Estate	35.1	35.1	35.5
Services	633.9	634.1	634.6
Business Services	134.7	135.1	136.7
Health Services	163.7	163.6	159.4
Hospitals	80.7	80.6	78.6
Legal Services	16.5	16.5	16.5
Educational Services	32.0	33.1	31.4
Private Colleges, Universities	16.5	16.5	16.3
Total Government	403.4	420.8	405.7
Total Federal Government	134.5	133.7	138.8
Department of Defense	48.2	48.1	46.8
Other Federal Government	86.3	85.6	92.0
Total State & Local Government	268.9	287.1	266.9
Total State Government	93.3	96.7	92.2
State Education	25.9	29.9	24.9
Other State Government	67.4	66.8	67.3
Total Local Government	175.6	190.4	174.7
Local Education	92.9	113.3	91.1
Other Local Government	82.7	77.1	83.6

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES

JULY 1991

Industry	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	July 1991	June 1991	July 1991	June 1991	July 1991	June 1991
MARYLAND						
Manufacturing	40.7	40.7	$475.78	$482.30	$11.69	$11.85
Durable Goods	42.1	42.0	508.57	528.36	12.08	12.58
Lumber and Wood Products	39.1	39.8	342.13	358.20	8.75	9.00
Stone, Clay, and Glass Products	44.4	44.6	506.60	510.67	11.41	11.45
Primary Metal Industries	44.3	43.8	738.04	728.83	16.66	16.64
Blast Furnaces	44.9	44.5	754.32	745.38	16.80	16.75
Fabricated Metals	40.0	40.8	433.20	440.23	10.83	10.79
Industrial Machinery	41.8	41.0	537.13	524.39	12.85	12.79
Electronic Equipment	46.3	45.3	431.52	420.84	9.32	9.29
Transportation Equipment	37.8	39.9	475.52	626.84	12.58	15.95
Instruments and Related Products	41.5	42.5	564.40	586.50	13.60	13.80
Miscellaneous Manufacturing Industries	40.0	41.2	382.00	401.70	9.55	9.75
Nondurable Goods	39.7	39.6	450.99	443.12	11.36	11.19
Food and Kindred Products	40.4	40.1	423.80	419.45	10.49	10.46
Textile Mill, Apparel	36.6	36.5	289.14	279.23	7.90	7.65
Paper and Allied Products	42.9	43.0	508.37	498.80	11.85	11.60
Printing and Publishing	36.6	36.3	505.08	495.50	13.80	13.65
Chemicals and Allied Products	42.1	41.0	532.57	510.45	12.65	12.45
Rubber and Plastic Products	41.0	43.0	414.10	427.85	10.10	9.95
BALTIMORE METROPOLITAN AREA						
Manufacturing	41.4	41.2	$503.01	$510.47	$12.15	$12.39
Durable Goods	42.3	42.2	533.40	562.10	12.61	13.32
Nondurable Goods	40.5	40.2	474.66	459.08	11.72	11.42

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

Reacting to statewide trends, the jobless estimate in the Baltimore Metro Area moved down from 6.6 percent in June to 6.2 percent in July. While much higher than the year ago figure of 5.5 percent, the current rate shows a marked improvement over February 1991's peak of 7.0 percent. With the exception of Howard County where joblessness held steady at 4.2 percent, unemployment rates declined throughout the region. In Queen Anne's County, hiring in food processing helped to uplift local labor market conditions. Employment in the county rose by about 540, easing the burden of increased labor force participation and, at the same time, reducing the jobless rate by almost a full percentage point to 4.3 percent in July. Baltimore City's rate, while improving noticeably, remained the highest in the region at 9.0 percent.

MARYLAND'S D.C. SUBURBS

In Maryland's D.C. suburbs, about 4.2 percent of the area's residents were unemployed during July, down from June's reported rate of 4.5 percent. Employment in the region rose by an estimated 27,585 persons, an increase which helped to lower the unemployment count by 2,139 persons to 43,071 in July. While growth in the region's industry employment was checked by continuing layoffs in education, hiring activity did surface in construction, services, manufacturing and local noneducation. With this hiring, local jobless rates declined, with the lowest unemployment rate, of 3.1 percent, reported in Montgomery County and the highest, of 7.2 percent, in Calvert.

WESTERN MARYLAND

Western Maryland's job market moved ahead in July, with the jobless rate falling from 9.5 percent to 8.3 percent. While still high when compared to other regions of the state, July's unemployment rate is the lowest seen in the area since October 1990. In both Garrett and Washington counties, rising employment contributed to sizeable jobless declines. Garrett County's rate, while dropping by 0.8 percentage points to 9.7 percent, remained the highest in the state for the second consecutive month. In Allegany County, a different scenario unfolded. While unemployment in the county declined, movement in the jobless rate reacted to a shrinkage in the labor force rather than to an upturn in employment.

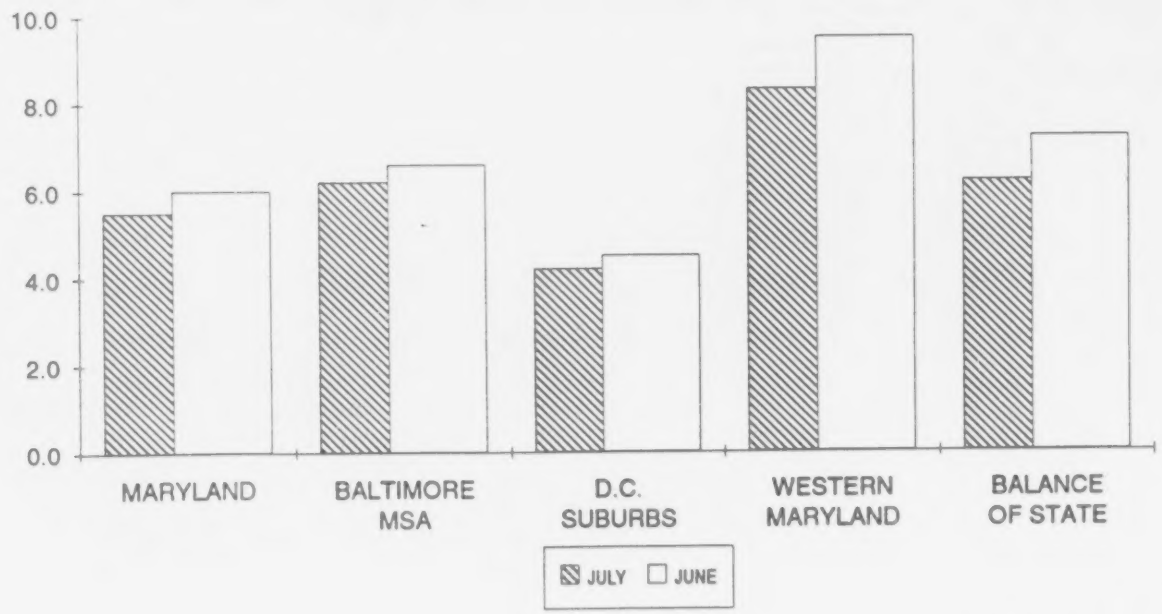
BALANCE OF STATE

In the Eastern Shore/Southern Maryland area, a reduction of about 1,600 on the regional unemployment rolls lowered the jobless rate by a full percentage point to 6.2 percent in July. With this decline, unemployment slipped below last year's estimate of 6.3 percent. About 11.5 percent of the statewide employment increase during July was centered in this highly seasonal region. Locally, employment increased and unemployment declined in each county with the exception of Kent and Wicomico. In Kent, the market reacted not only to an influx of jobseekers into the labor force but, also to temporary layoffs in the manufacturing industry. The net result was an increase in the county's jobless rate from 6.2 percent to 8.5 percent. In Wicomico, a small increase was noted in the county's unemployment count, however, this increase failed to raise the jobless rate from its level of 6.7 percent.

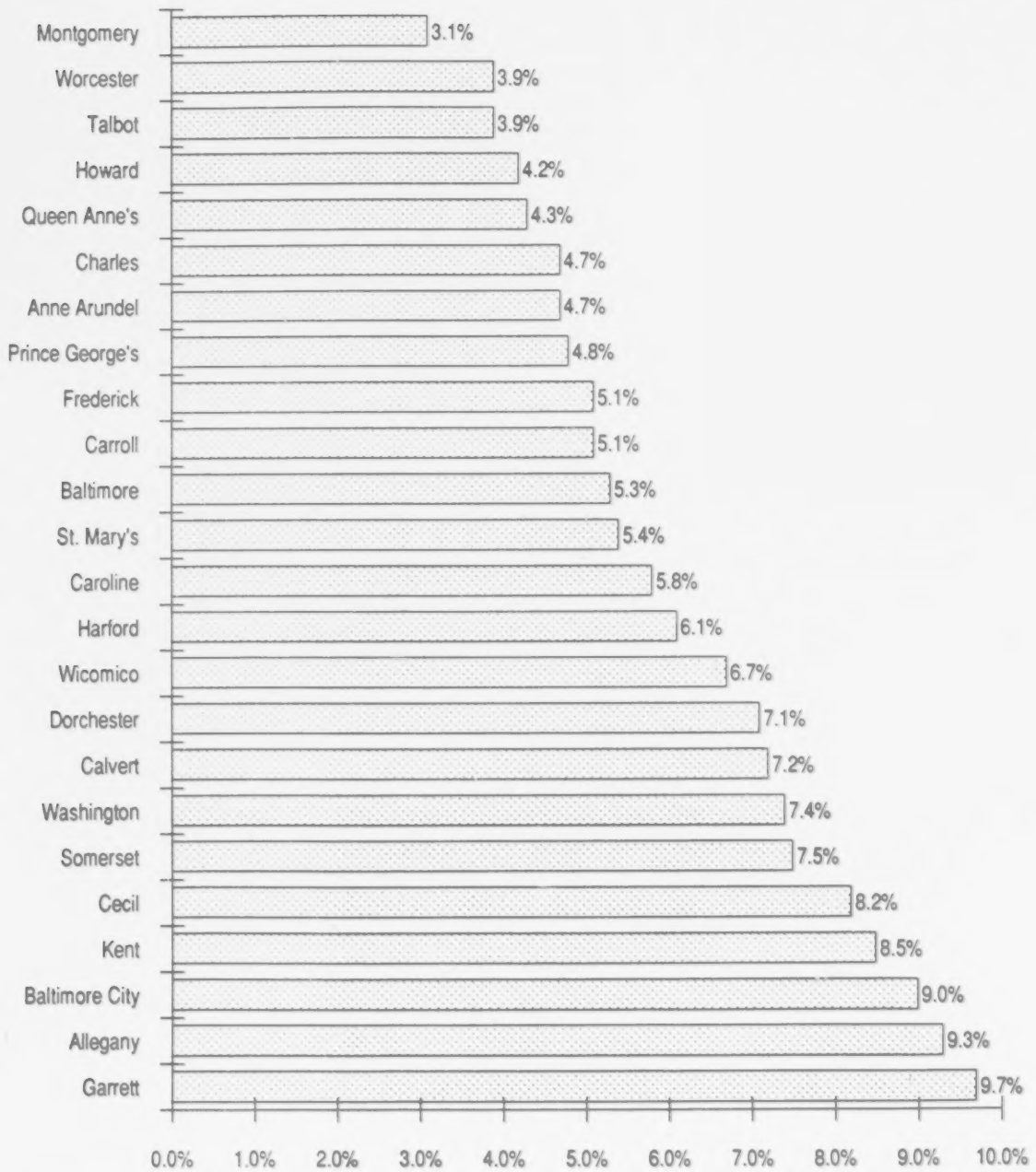
TOTAL UNEMPLOYMENT-MARYLAND AND REGIONS

	JULY 1991		JUNE 1991	
	NUMBER	RATE	NUMBER	RATE
MARYLAND	144,286	5.5	152,042	6.0
BALTIMORE METROPOLITAN AREA	77,821	6.2	80,583	6.6
MARYLAND'S D.C. SUBURBS	43,071	4.2	45,210	4.5
WESTERN MARYLAND	9,174	8.3	10,408	9.5
BALANCE OF STATE	14,218	6.2	15,842	7.2

UNEMPLOYMENT RATES - JULY 1991



LOCAL UNEMPLOYMENT RATES-JULY 1991



MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
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STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE
JULY 1991

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	JULY	JUNE*	JULY	JUNE*	JULY	JUNE*	JULY	JUNE*	JULY 1990
MARYLAND	2,627,635	2,555,200	2,483,349	2,403,158	144,286	152,042	5.5	6.0	5.0
BALTIMORE METROPOLITAN AREA	1,256,310	1,218,502	1,178,489	1,137,919	77,821	80,583	6.2	6.6	5.5
BALTIMORE CITY	359,283	349,314	326,936	315,682	32,347	33,632	9.0	9.6	8.2
ANNE ARUNDEL	223,453	216,483	212,882	205,554	10,571	10,929	4.7	5.0	3.8
BALTIMORE	406,290	394,116	384,859	371,610	21,431	22,506	5.3	5.7	4.7
CARROLL	65,783	63,637	62,460	60,310	3,323	3,327	5.1	5.2	4.0
HARFORD	87,150	84,383	81,858	79,040	5,292	5,343	6.1	6.3	5.8
HOWARD	97,889	94,515	93,737	90,510	4,152	4,005	4.2	4.2	3.2
QUEEN ANNE'S	16,462	16,055	15,756	15,214	706	841	4.3	5.2	3.4
D. C. AREA	1,030,991	1,005,545	987,920	960,335	43,071	45,210	4.2	4.5	3.8
CALVERT	24,709	24,067	22,940	22,299	1,769	1,768	7.2	7.3	5.2
CHARLES	49,392	48,091	47,065	45,750	2,327	2,341	4.7	4.9	3.6
FREDERICK	80,136	78,207	76,030	73,907	4,106	4,300	5.1	5.5	4.7
MONTGOMERY	440,400	429,228	426,534	414,625	13,866	14,603	3.1	3.4	3.0
PRINCE GEORGE'S	436,354	425,952	415,351	403,754	21,003	22,198	4.8	5.2	4.4
WESTERN MARYLAND	111,179	109,657	102,005	99,249	9,174	10,408	8.3	9.5	7.9
ALLEGANY	32,851	33,038	29,798	29,819	3,053	3,219	9.3	9.7	9.5
GARRETT	14,848	14,403	13,412	12,897	1,436	1,506	9.7	10.5	8.9
WASHINGTON	63,480	62,216	58,795	56,533	4,685	5,683	7.4	9.1	6.9
BALANCE OF STATE	229,151	221,497	214,933	205,655	14,218	15,842	6.2	7.2	6.3
CAROLINE	15,054	15,062	14,183	13,881	871	1,181	5.8	7.8	4.4
CECIL	37,675	36,787	34,577	33,550	3,098	3,237	8.2	8.8	9.2
DORCHESTER	17,782	17,511	16,516	16,016	1,266	1,495	7.1	8.5	7.6
KENT	10,036	9,660	9,178	9,064	858	596	8.5	6.2	6.0
ST. MARY'S	45,348	43,587	42,911	40,939	2,437	2,648	5.4	6.1	5.0
SOMERSET	14,632	13,319	13,535	12,124	1,097	1,195	7.5	9.0	10.6
TALBOT	17,984	18,270	17,277	16,704	707	1,566	3.9	8.6	4.2
WICOMICO	40,759	40,010	33,040	37,332	2,719	2,678	6.7	6.7	6.7
WORCESTER	29,881	27,291	28,716	26,045	1,165	1,246	3.9	4.6	3.7
UNITED STATES**	127,327,000	127,054,000	118,751,000	118,280,000	8,576,000	8,774,000	6.7	6.9	5.5

*Estimates for the state are revised.
**Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY--BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
BY REGION--JULY 1991

Industry	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	July 1991	June 1991	July 1991	June 1991	July 1991	June 1991	July 1991	June 1991
Total Nonagricultural Employment	1,142.3	1,151.8	772.7	781.9	93.3	93.8	149.9	150.7
Goods Producing	195.7	199.2	101.3	101.0	21.8	22.1	33.7	34.2
Mining	0.6	0.5	0.5	0.5	0.8	0.8	0.2	0.2
Construction	73.5	73.5	65.3	65.1	5.6	5.6	10.3	10.3
Manufacturing	121.6	125.2	35.5	35.4	15.4	15.7	23.2	23.7
Durable Goods	65.7	68.9	17.7	17.7	6.9	7.1	8.7	8.8
Nondurable Goods	55.9	56.3	17.8	17.7	8.5	8.6	14.5	14.9
Service Producing	946.6	952.6	671.4	680.9	71.5	71.7	116.2	116.5
Transportation & Public Utilities	55.8	56.0	33.8	34.1	5.2	5.3	7.5	7.4
Trade	266.1	268.6	198.4	198.6	26.8	26.5	41.3	39.9
Wholesale Trade	62.3	62.9	35.3	35.4	5.1	5.1	5.3	5.3
Retail Trade	203.8	205.7	163.1	163.2	21.7	21.4	36.0	34.6
Finance, Insurance, & Real Estate	75.2	75.5	46.1	46.2	3.3	3.3	5.5	5.5
Services	335.6	336.0	238.6	238.5	21.9	21.8	37.2	37.1
Total Government	213.9	216.5	154.5	163.5	14.3	14.8	24.7	26.6
Federal	51.7	51.0	74.6	74.4	1.8	1.8	7.0	6.9
State	71.6	72.0	14.4	16.7	4.6	4.6	4.6	5.0
Local	90.6	93.5	65.5	72.4	7.9	8.4	13.1	14.7

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

UNEMPLOYMENT COMPENSATION

	July 1991	June 1991	July 1990
Initial Claims	34,741	24,069	20,139
Weeks Claimed	316,652	267,450	171,071
First Payments	13,048	9,752	9,505
Final Payments	7,420	4,942	2,924
Weeks Paid	241,441	206,089	129,781
Net Benefit Amount	$42,958,465	$36,925,547	$21,832,299
Average Check Amount	$177.93	$179.17	$168.22

An increase of 44.3 percent raised July's initial claims count to its highest level since January 1991. While initial claims normally rise during July, this year's increase far exceeded the expected seasonal upturn. July's increment of nearly 10,700 in initial claims filings pushed the monthly total up to 34,741. Last year, July's count stood at a much lower 20,139 following a monthly increase of just 16.1 percent. While lackluster business conditions and sporadic vacation shutdowns undoubtedly contributed to the surge in claims, filings also rose as workers indirectly affected by strike activity at two separate manufacturing facilities experienced unexpected layoffs. July's upturn also reflects the rise in activity associated with quarterly changes in base year determinations. Concomitant with the increase in initial claims, the number of weeks claimed for unemployment benefits grew by just over 18.0 percent to 316,652. Just over three-fourths of all weekly claims filed during July resulted in compensation, with payments averaging $177.93, down slightly from June's check of $179.17. During July, the payment of an estimated 241,441 weekly claims cost the Unemployment Insurance Trust Fund nearly $43 million, a 16.4 percent increase over June's benefit outlay of $36.9 million. Slightly more than 3.0 percent of all payments during July were final entitlements, up from 2.4 percent in June.

REGIONAL INDICATORS
JUNE 1991

	BMA	DC Suburbs	Western Maryland	Balance of State
First Payments	6,913	2,868	901	1,598
Final Payments	3,876	1,752	657	524
Weeks Paid	128,452	59,212	16,940	19,325
Average Check Amount	$177.41	$186.35	$163.39	$155.48

With but a few exceptions, movements in regional measurements during July were indicative of the statewide trend. Payment activity increased across the state's four regions, with twenty-seven out of twenty-eight local offices reporting higher numbers of weekly payments. In the Balance of State area where an increase of 12.0 percent raised weekly payments to 19,325 in July, just over 80.0 percent of the regional upturn resulted from expanded activity at the Salisbury local office. For those claimants receiving benefits during July, payments ranged from a high of $186.35 in the D.C. suburbs to a low of $155.48 in the Balance of State. Claimants in the Balance of State, unlike in other regions of the state, did see an increase, of $3.09, in their benefit checks over the month.

Maryland
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